

FY 2015



Self-Determination Training Handbook



**FEDERAL AND
TRIBAL OFFICIALS**
Indian Self-
Determination and
Education Assistance
Act (Pub. L. 93-638)
Bureau of Indian Affairs

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GENERAL INFORMATION

WHY WE TRAIN

We train in order to ensure that all Bureau of Indian Affairs (BIA), other Federal Agencies, and Tribal personnel are provided the opportunity to receive training in the Indian Self-determination and Education Assistance Act of 1975 (ISDEAA), Public Law (P.L.) 93-638, as amended. We train to ensure that all BIA employees charged with the responsibility of carrying out the purpose and intent of the Act are provided training. We train to prepare those BIA employees responsible for all facets in the administration of contracts and grants awarded under the ISDEAA, so they carry out their responsibilities in a way that is consistent with applicable laws, rules, and regulations.

We train to enable guidance and technical assistance to Tribes and Tribal staff in order to promote common understanding of the law, regulations, and intent of programs, and acquaint Tribal staff and officials of the opportunities for innovative program design, skill development and operation under the ISDEAA.

The training curriculum is designed to meet the ISDEAA Title I Self-Determination training requirements established for Approving Officials and Level I and Level II Awarding Officials. Courses are designed to satisfy the needs of Line Officers when functioning as Approving Officials and Self-Determination staff delegated authority and certified as Awarding Officials. This Self-Determination training guide includes information for furthering continuing education, or maintenance of required courses to allow Bureau, Federal and Tribal staffs to enhance their knowledge, skills, and abilities in contract administration and assist certified Awarding Officials in maintain their certification. Courses listed in support of the Awarding Official training requirements are so identified.

The Division of Self-Determination (DSD) encourages Self-Determination and Tribal staff to also attend *Federal Acquisition* courses, specifically those that are Federal Acquisition Institute (FAI) approved.

HOW TO REGISTER FOR A COURSE

Courses are open to Federal and Tribal contract and grant personnel who are directly or indirectly responsible for the design, operation, and management of programs which are contractible under the ISDEAA, as amended.

The BIA, and other Federal and Tribal employees interested in attending ISDEAA training courses, must contact and register with Central Office West at: 505-414-0272. All other courses are provided via Webinar and registration forms will be sent through your BIA Self-Determination Awarding Official offices. If you are a Federal employee, you can

register by clicking on the site in the BisonConnect email and selecting the DSD website. For further information, please contact Debra Peebles at: 505-414-0272.

CANCELLATIONS

Registrants unable to attend are urged to report cancellations to the respective training location or Debra Peebles (505-414-0272) at least two weeks prior to the specific course date so that substitutions can be made. Substitutions may be made until the beginning of the course.

The DSD reserves the right to cancel any training course. The DSDS will endeavor to notify registered participants prior to the first day of a class if a course is being cancelled.

WAITING LISTS

In the event the number of applicants exceeds the maximum class size, a waiting list will be established for the specific course. The names on the waiting lists will be given priority when applying for the next session of the course within the fiscal year.

TUITION/COURSE FEE

There is no tuition or course fee to BIA, Tribal, or other agency staff for any course listed in this Handbook. **Travel and per diem expenses are the responsibility of the participant or the participant's employer.**

NEW!! Materials

The *Division of Self-Determination* requires students to download course material to their laptops, desktops, tablets, etc., or print their own hard copies of the material prior to attending class. The Division supports technology that makes it easier to simply download course material to computer-friendly applications and assists Self-Determination in implementing cost savings as well as eco-friendly measures when conducting these courses.

A list of class material will be emailed to each student as they register for each course. Students will then need to go to the Self-determination web page and link to Course Material: <http://www.bia.gov/WhoWeAre/BIA/OIS/Self-Determination/index.htm>.

If students have any issues either downloading or accessing course material, please contact Debra Peebles at: 505-414-0272.

NOTE: *If printing hard copies, do not print the PowerPoint in color, which will save on color toner costs to your Agency.*

COURSE PARTICIPANTS WITH SPECIAL NEEDS

Registrants should provide notice of special needs; this will allow the DSD Training Office to make any necessary arrangements prior to the commencement of the training session.

LOCATION

Your computer and phone!

Once you register, you will be sent a link to your selected Webinar.

- The audio conference # is always: **(866-615-6665)/Passcode: 30354736.**

For teacher-led training, host BIA Regions are encouraged to select training sites convenient for Tribes within their administrative jurisdiction. Each participant is responsible for making their own travel and hotel arrangements. A training announcement will be issued which identifies the training course, the training location, and any specific hotel accommodation arrangements, such as blocking a number of rooms and arranging special room rates.

Training sessions in Albuquerque, NM will be hosted by the National Indian Programs Training Center (NIPTC) 1011 Indian School Rd. NW., Albuquerque, NM 87104. DOI University and Central Office will issue training announcements of DSDS Training.

COURSE SCHEDULE REVISIONS/ADDITIONS

Course data and training locations are subject to change. Training participants will be informed of any revisions prior to the beginning of the training session.

CERTIFICATES AND TESTING

The BIA Regional Offices will award certificates to Federal students who have fully attended the course and achieved an 80 percent average on all core curriculum and/or graded material. Achieving a level of accuracy in each course assists in determining competency and the knowledge necessary toward Awarding Official certification in accordance with the Awarding Official's Certification System. *Central Office West will issue Certificates for ISDEAA courses taken at NIPTC.*

The Regional Offices will issue retake exams for those Federal personnel who do not initially pass on the first sitting. If they do not pass the second exam, their supervisor will issue a third and final attempt. They will be required to retake the course if they do not pass the third and final attempt.

The participant list shall include the name, job title, mailing address, and telephone number for each participant. The participant list and sign-in or registration sheets shall be used for preparation of the certificates to ensure that names are legible and accurate in documentation and correct spelling for certificates.

Certificates may take up to four weeks for delivery!

SPECIAL REQUESTS

Special Requests for training are “unscheduled courses”. All courses listed as Basic and General courses in this handbook are available on request. Bureau Regional and Agency Offices or Tribes and Tribal organizations, may request a special course be provided at a location within their BIA Region through their servicing Regional Office. Training site location and training material copying will be the responsibility of the requesting Bureau entity. **Submit a written request identifying the specific course and proposed dates for training to Terrence Parks, Chief, Division of Self-Determination: terrence.parks@bia.gov.**

NOTE: Provisions of training is subject to the availability of the instructor.

COURSE DESCRIPTIONS FY-2015



ISDEAA OFFICIAL TRAINING COURSES

(Review for Prerequisites)

Training courses offered under this section will cover all aspects of the ISDEAA, P.L. 93-638, as amended (ISDEAA). They also cover those aspects necessary for the administration and oversight of contracts under the ISDEAA; and with the courses required for Level I certification as a prerequisite, provide the basic training requirements for certification as a Level II awarding official. Specific training and experience requirements for certification as a Level II Awarding Official are found in the Awarding Official Certification System Handbook¹.

| COURSE | DESCRIPTION |
|---|---|
| <i>ISDEAA, (P.L 93-638), as amended, and the implementing REGULATIONS - 25 CFR, Chapter V, Part 900, Subparts A - P</i> | <p style="text-align: center;">Prerequisite</p> <p style="text-align: center;">All students must start by taking the following:</p> <p>This is a required course for new delegate Agency representatives, Awarding Officials, Approving Officials, Agency program staff (AOTRs), and anyone interested in obtaining contracts, grants and cooperative agreements. This is a good refresher course for renewing knowledge in the administration of the Self-determination Act.</p> |

¹ The Handbook is available on the:

<http://iiamabqzucmw01p.ia.doi.net:16200/inside.indianaffairs/Org/BIA/OIS/Self-Deter/index.htm> webpage.

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| <p><i>AWARDING OFFICIAL'S TECHNICAL REPRESENTATIVE (AOTR/SAOTR) and Approving Official Training</i></p> | <p>Participants through lecture, discussions, and case studies will learn the role and responsibilities of the Awarding Official's Technical Representative (AOTR), and the Subordinate Awarding Official's Technical Representative (SAOTR), in the Self-Determination contracting process. Interaction with the awarding official and the approving official will be addressed. The AOTR/SAOTR environment as it relates to standards of conduct and ethics will also be discussed. This course is provided with a one-day Approving Official Training. (NOTE: The Approving Official session is mandatory for all persons who are, or will be, identified as an Approving Official</p> |
| <p><u>Online Course(s)</u></p> <ul style="list-style-type: none"> • <i>ISDEAA (P.L. 93-638) Training</i> • <i>AOTR/SAOTR Training</i> | <p>These online courses are refresher courses and are not meant to replace any 24-hour teacher-trained course. This online AOTR course will qualify as a recertification course two years after an AOTR/SAOTR takes the 24-hour course.</p> <p>The online courses can be found by following this link: http://www.bia.gov/WhoWeAre/BIA/OIS/Self-Determination/Training/index.htm</p> |
| <p><i>Single Audit</i></p> | <p>This is designed to improve student's skills understanding and answering audit issues in relation to the requirements of the Single Audit Act. Students will review audit "Findings" and "Corrective Action Plans" through the guidance of the Indian Affairs Manual, OMB Circular A-133, and the Office of Assessment and Evaluation's Handbook.</p> <p>This course is offered along with all 24-hour courses, as a single webinar, and an 8-hour live training.</p> |
| <p><i>Program Standards and Statement of Work</i></p> | <p>This course provides insight to the preparation of Program Standards and Statement(s) of Work. Instruction relates regulations to internal and external administrative procedures. Participants will develop Program Standards and Statement of Work (SOW) and an Annual Funding Agreement. The course involves lecture, group discussion and assignments (case study type issues).</p> |

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| <i>Contract Administration I and II Focus: Section 105/ Subpart F Management Systems</i> | <p>The two courses are conducted in a workshop format. Emphasis is on “Management Systems” (Finance, Property, and Procurement). Instruction relates Federal regulations to internal and external administrative procedures. Participants discuss management systems concerns. The course involves lecture, group discussion and assignments (case study type issues). It provides training on the review and monitoring of management systems aspect of contract administration.</p> |
| <i>Section 102 of the Act (2-hour course)</i> | <p>This course discusses self-determination proposals, the 90-day timeframe, the approval and declination process, and, tort claims.</p> <p>This is a 2-hour webinar.</p> |
| <i>CONSTRUCTION CONTRACTING UNDER ISDEAA-Section 105, 25 CFR, Part 900, Subpart J</i> | <p>This course will provide in-depth coverage of Construction Contracting under ISDEAA, as amended, and 25 CFR, Chapter V, Part 900, Subpart J. It will include coverage on the preparation, negotiation, and award of construction contracts using the authority of ISDEAA, as amended. Development of specifications and drawings, inspection of work and performance standards will be emphasized to detail responsibilities of all parties to a contract. The course involves lecture, group discussion and case studies.</p> |
| <i>ALTERNATIVE DISPUTES RESOLUTION (CDA/ADR) and APPEALS TRAINING</i> | <p>This course through lecture, group discussion and exercises will provide participants with a basic understanding of the Contract Disputes Act and procedures, the Alternative Disputes Resolution process, and the Appeals process and procedures.</p> |
| <i>Section 108 of the Act</i> | <p>This course covers all aspects of the terms and conditions of the Model Contract Agreement for non-construction contracts and grants.</p> <p>Who should attend: Tribes, AOTRs, Awarding Officials, Superintendents, and Self-Determination Specialists.</p> |

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| | This is a 3-hour Webinar. |
| <i>BASIC INDIRECT COST (Contract Support Course Training)</i> | This course provides a basic instruction on managing Indirect Cost. Addresses terminology, and Indirect Cost Computation. Through lecture, case studies, and assignments participants will learn the terms used in indirect cost and the basics of managing indirect cost. |
| <i>Contract Support Cost (CSC) Policy And CSC Shortfall Report Computation (Contract Support Cost Training)</i> | This course provides basic instruction on the BIA Direct CSC in accordance with the CSC Policy. Through lecture and group discussion participants will learn the purpose and intent of these documents. |
| <i>Start-up and Pre-Award Contract Support Cost Training</i> | This course is intended to provide basic understanding and uniform implementation of the Bureau of Indian Affairs Contract Support Policy and Section 106 of the Act regarding Start-up and Pre-Award CSC. |
| <i>FBMS for Self- determination Contracts, Grants and Cooperative Agreements</i> | For all BIA involved in accessing the Financial and Business Management System (FBMS) to obligate funds, including Requisitioners. |



FY2015 TRAINING SCHEDULE

Note:

- All training is open to both Federal and Tribal officials/staff.

| COURSE | LOCATION(S) | RECOMMENDED ATTENDEES |
|---|--|---|
| P.L.93-638, the Law and Regulations | Anchorage, AK December 1-3, 2014 Oklahoma City, OK January 6-8, 2015 Fort Lauderdale, FL March 2-4, 2015 Albuquerque, NM June 2-4, 2015 | Federal Employees Tribal Officials/Staff |
| Awarding Official's Technical Representative/SAOTR APPROVING OFFICIAL TRAINING | Webinar January 20-22, 2015 Portland, OR May 13-15, 2015 Sacramento, CA July 8-10, 2015 Albuquerque 1-3, NM September, 2015 | Federal Employees |
| Construction Training Section 105/Subpart J | Anchorage, AK December, 1-3, 2015 (tentative) Webinar February 3-5, 2015 Sioux Falls, SD June 9-11, 201 | Federal Employees Tribal Officials/Staff |

| COURSE | LOCATION(S) | RECOMMENDED ATTENDEES |
|--|---|---|
| Contract Administration I&II Management Systems | Billings, MT February 9-11, 2015 Portland, Or July 22-24, 2015 Bloomington, MN October 7-9, 2016 | Federal Employees Tribal Officials/Staff |
| Contract Support Costs The Policy | Webinar May 28, 2015 March 10, 2015 | Federal Employees Tribal Officials/Staff |
| FBMS Prism | Albuquerque, NM May 5-6, 2015 | Federal Employees |
| Alternative Dispute Resolution | Webinar August 4, 2015 | Federal Employees Tribal Officials/Staff |
| Single Audit | Webinar March 12, 2015 Albuquerque, NM August 6-7, 2015 | Federal Employees Tribal Officials/Staff |
| Superintendent Training Delegation of Authority Approving Official Duties in 638 Contracting. | Billings, MT November 13-14, 2014 Webinar May 5-6, 2015 | Federal Employees |



BIA Level II Awarding Officials

(As of February 2, 2015)

| REGION | AWARDING OFFICIAL | CONTACT NUMBER |
|--|---------------------------------|-------------------|
| Regions: | | |
| Alaska | Delores Ayotte | 907-271-4086 |
| Eastern | Kirk Meyer | 615-564-6525 |
| Eastern Oklahoma | Sherri K. Smith | 918-781-6962 |
| Great Plains | Yvonne LaRoque | 605-226-7426 |
| Midwest | Michelle Corbine (McCormick) | 612-725-4588 |
| Navajo | Frances Price | 505-863-8311 |
| Northwest | Tim Brown | 503- 231- 6760 |
| Pacific | Victoria May | 916-930-3742 |
| Rocky Mountain | Stella Corbin | 406-247-7983 |
| Southern Plains | Kelly K. Moore | 405-247-8932 |
| Southwest | Frank Bitonti | 505-563-3731 |
| Western | Carolyn Richards | 602-379-4189 |
| HEADQUARTERS | | |
| Central Office (Washington, DC) | Sunshine Jordan | 202-513-7616 |